

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information; and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government.
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Key Outcome Indicators:

Performance Measure	2005 Business Plan Results	2006 Business Plan Target	How are we doing?
PERCENT OF ACCURATE BOARD OF SUPERVISORS AGENDA TITLES. What: Measurement of COB's accuracy and training. Why: Indicator of COB's compliance with Brown Act and identifies areas requiring training.	99.4% of published agenda titles were accurate with no errors.	99.25% of agenda titles are published with no errors.	COB has consistently maintained a high level of accuracy.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Measures success of the COB's training and outreach efforts to the public and tax agents.	86% of applications were completed accurately and timely filed.	88% of applications accurately completed and timely filed.	The State mandated form can be confusing to taxpayers. Increased use of e-filing and continued outreach should improve these statistics.
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Assesses whether policies and procedures result in processing appeals within the statutory deadline.	Although the 2 year deadline has not yet expired for all of the 2004 filings, 99.2% of the appeals have been resolved or waivers received. Cases in litigation included in unresolved.	100% of appeals resolved or waivers filed, excluding cases in litigation.	COB meeting goal due to manageable number of filings and quality tracking of database information and appeals.

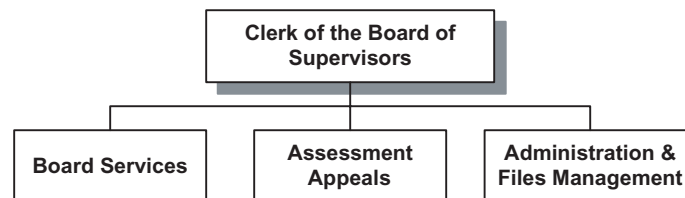
Key Outcome Indicators: (Continued)

Performance Measure	2005 Business Plan	2006 Business Plan	How are we doing?
	Results	Target	
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD OR SCHEDULED WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Measures COB's success in timely resolution of appeals & reduces duplicates in following year.	99% of 2004 filings held initial hearings within one year, excluding those with applicant waivers filed.	95% of hearings scheduled within one year, excluding filings with applicant waivers.	With filings remaining at a manageable level for several years and usage of automation, COB has been successful in providing this level of client service. However, with increased filings and more complex cases, ability to provide this level of service may decline.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.	COB has received favorable ratings from 95%-100% of respondents.	97% rating of services as good or outstanding.	COB has consistently received favorable ratings from its clients.

FY 2005-06 Key Project Accomplishments:

- Continued participation with property tax administration departments in development of new Orange County Assessment Tax System
- Increased usage of e-filing for assessment appeals applications
- Began needs assessment and planning for development of Conflict of Interest form e-filing

Organizational Summary



COB - Executive - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

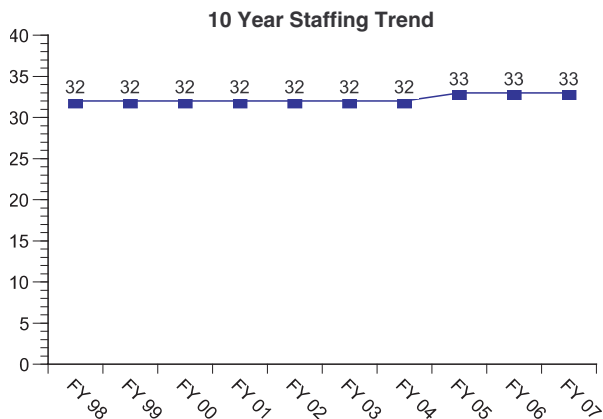
Board Services - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications, postings and notices; receives and administers bid

openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

Assessment Appeals - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

Administration/Files Mgt - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing, petty cash and payroll functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Even with increased workload and additional responsibilities and services, Clerk of the Board has maintained level staffing requirements for over ten years and has virtually eliminated the use of extra and temporary help. This has been accomplished primarily through automation of previously labor-intensive activities. Increase of one position in FY 04-05 was due to the transfer from the County Executive Office of the position supporting the Board Chairman.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Through use of automation developed and implemented over the past few years, COB has been able to reduce ongoing operational costs and maintain level staffing. This has been accomplished while at the same time enhancing the availability of information and documents both internal to the County and to the general public. COB will continue to pursue cost savings and revenue enhancements where efficient and cost-effective. Ideas implemented include use of on-line filing of assessment appeals applications to reduce errors and eliminate costs of data entry and utilization of online document storage to reduce printing costs and for faster and easier document location and retrieval.

Changes Included in the Base Budget:

In order to meet its 06-07 Net County Cost limit, the Clerk of the Board was required to delete one position. An augmentation request has been submitted for its restoration as loss of the position would jeopardize the department's ability to provide services in a timely manner or result in errors or omissions that could make the County vulnerable to lawsuits or legal challenge of actions.

Approved Budget Augmentations and Related Performance Results:

Unit Amount	Description	Performance Plan	BRASS Ser.
Restore Board Services Specialist Position and NCC to Maintain Current Level of Service Amount:\$ 42,580	Restore one Board Services Specialist position deleted to meet NCC limit	Complete mandated/time sensitive files management and public record requests; ASR review/tracking	5125

Final Budget History:

Sources and Uses	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual Exp/Rev	Budget As of 6/30/06	Actual Exp/Rev ⁽¹⁾ As of 6/30/06	Final Budget	Actual Amount	Percent
Total Positions	33	33	33	33	0	0.00
Total Revenues	201,996	121,100	157,379	144,327	(13,052)	-8.29
Total Requirements	2,698,016	2,690,320	2,551,162	2,833,204	282,042	11.06
Net County Cost	2,496,021	2,569,220	2,393,783	2,688,877	295,094	12.33

(1) Amounts include prior year expenditure and exclude current year encumbrance. Therefore, the totals listed above may not match Total FY 2005-06 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page A22

Highlights of Key Trends:

- The department continues to focus on new automation techniques and public outreach efforts to enhance service levels to both the public and internal clients.

Budget Units Under Agency Control:

No.	Agency Name	COB - Executive	Board Services	Assessment Appeals	Administration/Files Mgt	Total
011	Clerk of the Board	378,368	838,547	992,845	623,444	2,833,204
	Total	378,368	838,547	992,845	623,444	2,833,204

011 - Clerk of the Board

Summary of Final Budget by Revenue and Expense Category:

Revenues/Appropriations	FY 2004-2005		FY 2005-2006	FY 2005-2006	FY 2006-2007			Change from FY 2005-2006			
	Actual	Exp/Rev	Budget	Actual Exp/Rev ⁽¹⁾	As of 6/30/06	Final Budget	Amount	Actual	Percent		
Charges For Services	\$	199,848	\$	121,100	\$	155,458	\$	142,827	\$	(12,631)	-8.13%
Miscellaneous Revenues		2,148		0		1,921		1,500		(421)	-21.91
Total Revenues		201,996		121,100		157,379		144,327		(13,052)	-8.29
Salaries & Benefits		1,936,006		1,949,911		1,871,021		2,182,211		311,190	16.63
Services & Supplies		764,391		742,509		682,764		653,393		(29,371)	-4.30
Services & Supplies Reimbursements		0		(2,100)		0		0		0	0.00
Intrafund Transfers		(2,381)		0		(2,623)		(2,400)		223	-8.51
Total Requirements		2,698,016		2,690,320		2,551,162		2,833,204		282,042	11.06
Net County Cost	\$	2,496,021	\$	2,569,220	\$	2,393,783	\$	2,688,877	\$	295,094	12.33%

(1) Amounts include prior year expenditure and exclude current year encumbrance. Therefore, the totals listed above may not match Total FY 2005-06 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Final Budget Summary of COB - Executive:

Revenues/Appropriations	FY 2004-2005		FY 2005-2006		FY 2005-2006		Change from FY 2005-2006	
	Actual	Exp/Rev	Budget	As of 6/30/06	Actual Exp/Rev ⁽¹⁾	As of 6/30/06	FY 2006-2007	Actual

Final Budget Summary of Board Services:

Revenues/Appropriations	FY 2004-2005		FY 2005-2006	FY 2005-2006	Change from FY 2005-2006						
			Budget	Actual Exp/Rev ⁽¹⁾	FY 2006-2007	Actual					
	Actual Exp/Rev		As of 6/30/06	As of 6/30/06	Final Budget	Amount	Percent				
Charges For Services	\$	11,916	\$	8,100	\$	9,425	\$	8,100	\$	(1,325)	-14.06%
Miscellaneous Revenues		380		0		1,116		500		(616)	-55.19
Total Revenues		12,296		8,100		10,541		8,600		(1,941)	-18.41
Salaries & Benefits		452,581		464,857		449,871		544,606		94,735	21.06
Services & Supplies		174,879		282,797		177,135		253,761		76,626	43.26

Final Budget Summary of Board Services:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual Exp/Rev	Budget As of 6/30/06	Actual Exp/Rev ⁽¹⁾ As of 6/30/06	Final Budget	Actual Amount	Percent
Services & Supplies Reimbursements	0	(2,100)	0	0	0	0.00
Intrafund Transfers	(2,381)	0	(2,623)	(2,400)	223	-8.51
Total Requirements	625,079	745,554	624,382	795,967	171,585	27.48
Net County Cost	\$ 612,783	\$ 737,454	\$ 613,841	\$ 787,367	\$ 173,526	28.27%

Final Budget Summary of Assessment Appeals:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual Exp/Rev	Budget As of 6/30/06	Actual Exp/Rev ⁽¹⁾ As of 6/30/06	Final Budget	Actual Amount	Percent
Charges For Services	\$ 150,643	\$ 110,000	\$ 143,175	\$ 128,322	\$ (14,853)	-10.37%
Total Revenues	150,643	110,000	143,175	128,322	(14,853)	-10.37
Salaries & Benefits	587,436	647,141	607,320	712,660	105,340	17.35
Services & Supplies	381,480	295,474	370,418	322,765	(47,653)	-12.86
Total Requirements	968,916	942,615	977,738	1,035,425	57,687	5.90
Net County Cost	\$ 818,272	\$ 832,615	\$ 834,563	\$ 907,103	\$ 72,540	8.69%

Final Budget Summary of Administration/Files Mgt:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual Exp/Rev	Budget As of 6/30/06	Actual Exp/Rev ⁽¹⁾ As of 6/30/06	Final Budget	Actual Amount	Percent
Charges For Services	\$ 35,285	\$ 3,000	\$ 2,670	\$ 6,405	\$ 3,735	139.89%
Total Revenues	35,285	3,000	2,670	6,405	3,735	139.89
Salaries & Benefits	520,317	517,997	448,465	526,181	77,716	17.33
Services & Supplies	13,697	73,994	13,218	18,343	5,125	38.78
Total Requirements	534,014	591,991	461,682	544,524	82,842	17.94
Net County Cost	\$ 498,730	\$ 588,991	\$ 459,012	\$ 538,119	\$ 79,107	17.23%